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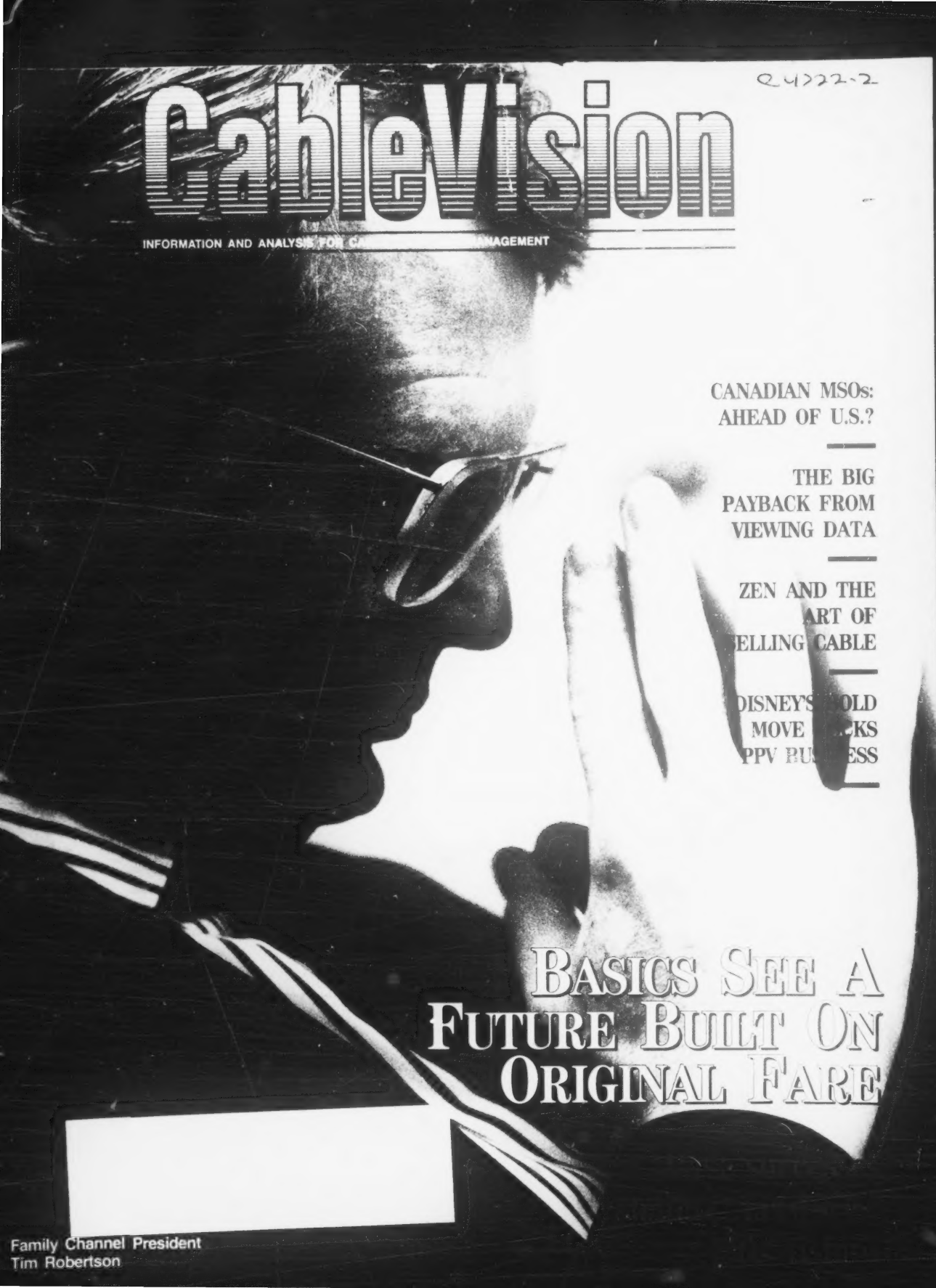
CableVision

INFORMATION AND ANALYSIS FOR CA[illegible]AGEMENT



CANADIAN MSOs: AHEAD OF U.S.?

THE BIG PAYBACK FROM VIEWING DATA

ZEN AND THE ART OF [illegible]ELLING CABLE

[illegible]ISNEY'S [illegible]OLD MOVE [illegible]CKS PPV BU[illegible]ESS

BASICS SEE A FUTURE BUILT ON ORIGINAL FARE

Family Channel President Tim Robertson

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT JULY 3, 1989

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Photo by Arnold Adler

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ITCI

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ABP BPA

The CABLE POLL

TMMidwest CATV & CableVision Magazine

Operators want trade shows to focus more on education

The ideal cable trade show would offer greater educational opportunities, focus on technological issues, offer a wide exposure to hardware vendors and be somewhat shorter but absolutely no longer, according to Cable Poll™ data in which nearly half the respondents said they did not attend a single convention last year.

Asked by Cable Poll™ interviewers to rate the things they considered "very important" about attending trade shows, 49 percent said it was exposure to new hardware and technology, 48 percent said it was socializing and meeting other people, 45 percent said it was developing vendor relationships, 41 percent said it was interacting with the programmers, and 39 percent said it was attending panel sessions.

One thing system management personnel definitely want out of trade shows are more opportunities to increase their knowledge of the business. Asked if they favored more educational opportunities at conventions, a resounding 91 percent said yes.

Fifty-seven percent said they opposed having more "programming only" shows, while 65 percent said they favored more "technology only" conventions. But one thing respondents don't want is shows that run over several days. Forty-two percent of respondents said they favored shorter conventions, and 83 percent said they opposed shows lasting longer than most do now.

Number

7

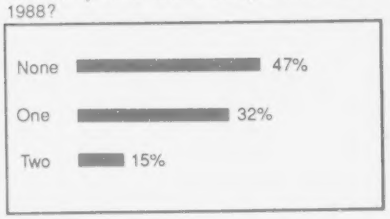
in a series of ten

A surprising 47 percent of all respondents said they did not attend any trade shows last year, and of the roughly half who did, 32 percent said they went to only one and 15 percent said they attended two. But, interestingly, a majority—52 percent—said they opposed having fewer conventions.

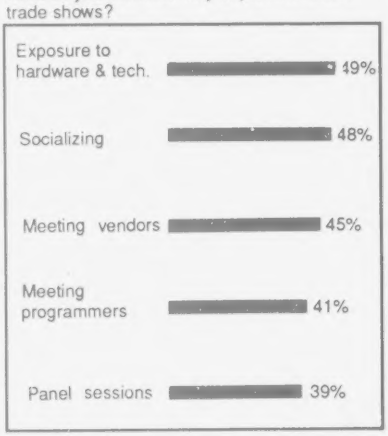
Asked what shows they would attend if they could go to three, the respondents most often mentioned the National Show (39 percent), their local state show (26 percent), and the Western Show (25 percent). Close behind were the Atlantic Show (21 percent) and the Eastern Show (20 percent).

The Cable Poll™ is a sampling of industry opinion conducted on a regular basis by Ryan/Samples Research Inc. for Midwest CATV and *CableVision* magazine. Telephone interviews for this edition of the poll were conducted March 13-23; a total of 400 interviews were completed using a listing of system management personnel obtained from CableFile Research. Cable Poll™ researchers *are* 95 percent confident that the results are accurate within plus or minus 4.9 percentage points. ■

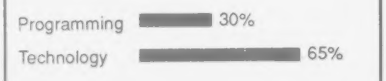
How many trade shows did you attend in 1988?



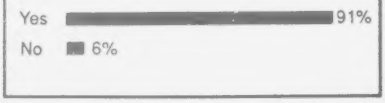
What do you consider very important about trade shows?



Do you want more programming or more technology shows?



Do you favor more educational opportunities at shows?



Canada's MSOs setting trends that may be mirrored in States

By Larry Jaffee

MuchMusic, Canada's answer to MTV, is celebrating its fifth anniversary next month. The Toronto-based network currently reaches over 3.8 million cable subscribers from its street-level studio. The universe will reach 5 million in September when MuchMusic, originally a pay channel, becomes universally available on systems' basic service tier.

While it's true that the Canadian cable television industry continues to be a pale reflection of its American counterpart, which is 10 times its size, cable in Canada is more rapidly reaching maturity while diversifying into other telecommunications businesses in a pattern that may be duplicated in the States.

Canadian MSOs continue to operate under relatively tight government regulations on rates and types of allowable programming, factors which have caused them to lag behind their American counterparts in cable-developed programming, in channel capacities and in taking advantage of new revenue streams such as pay-per-view and local advertising sales.

But despite this, the Canadian cable industry is ahead of the U.S. in other respects. Perhaps because penetration in Canada already stands at 70 percent—an enviable figure from a revenue standpoint but one which indicates limited future growth—Canadian operators embraced fiber optics sooner and are moving at a more rapid pace than Americans in deploying the technology.

And some Canadian cable companies aggressively are diversifying into non-cable businesses, a trend best exemplified by Rogers Communications, Canada's largest MSO, getting into the long-distance telephone business, financed largely with money from the sale of its U.S. cable holdings last year. The move into the long-distance market is "a natural thing for us to get into," says Chairman Ted Rogers. Rogers already has a sizable cellular phone business.

Meanwhile, Videotron Ltee., the second largest MSO, plans to establish its own digital fiber link between Montreal and Quebec. The link will provide interactive TV, home shopping and home banking to subscribers as well as dedicated video and high-speed data transmission services to government and private enterprises. The move positions Videotron as a major player in telecommunications.

Canadian operators are rapidly upgrading their plants with fiber optics. Ken Regnier, vice president of marketing and sales for Comlux, a manufacturer of advanced digital fiber optic terminal equipment, estimates that fiber is being used at a greater pace on a per-system basis in Canada than in the U.S.

Rogers will spend $525 million, approximately $330 per subscriber, over the next three years to make technological improvements to its communications networks in Ontario, Alberta and British Columbia. (All figures herein are expressed in Canadian dollars.)

Rogers recently bought Comlux's 560 Megabit Optical Terminals for its systems in the Toronto area. The Rogers network system will provide full bi-directional operation between customer sites, as well as fully redundant fiber optic transmission paths.

Another example of Canadian fiber use is CF Cable TV of Montreal, which is linking two hubs by fiber. The first hub was to be operational by July 1, and the second is targeted for completion in 1990. The FM network initially will have a 40-channel capacity; the hubs will be linked to the main headend via 2 km lengths of fiber cable.

And Maclean Hunter has been

using fiber in its systems during rebuilds to replace microwave links, according to Barry Gage, president of the Toronto-based company, the third largest operator in Canada. Maclean Hunter is also the sole remaining Canadian company in the U.S. cable market, with 330,000 subs.

The Canadians as well have been in the forefront of HDTV to help establish a North American standard. Rogers and Maclean Hunter executives are participating in U.S.-based committees to evaluate the various proposals. Telesat Canada, which owns and operates the satellites for the Canadian cable industry, in October will begin a two-year closed-circuit test of advanced television applications using Scientific-Atlanta's HDB-MAC system, and later the Japan Broadcasting Co.'s MUSE equipment. HDTV signals will be transmitted via satellite to several theaters.

"Telesat is not trying to set an industry standard for HDTV," says Jacqueline Cook, Telesat Canada's broadcast services development manager. "What we are trying to do is bring advanced television systems to Canada to demonstrate the possibilities the new technology offers our customers, and enable ourselves to develop a level of technological and operational expertise which will allow them to make decisions about the technology and the standards that will be most suitable for Canada." She adds that Telesat would like to conduct the tests in partnership with the Canadian cable industry.

Maclean Hunter, headed by Barry Gage, is rebuilding its systems with fiber links.

Despite Rogers' exit from the U.S., Maclean Hunter has no intention of selling its American holdings, which currently are being upgraded in a $25 million project. Gage points out that Maclean Hunter is in the middle of a major newbuild in Detroit, operates several sizable systems in New Jersey and is planning a move into Florida by acquiring the Fort Lauderdale system owned by

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CANADIAN CABLE OVERVIEW

	'84	'85	'86	'87
PENETRATION				
Operating Systems	747	827	921	1,000
TV Households	9.3	8.9	9.3	9.4
Homes Passed	7.1	7.4	7.7	8.0
Subscribers	5.4	5.7	6.0	6.3
% Subs vs. Total Homes	62.1%	63.5%	65.2%	67.0%
% Subs vs. Homes Passed	75.9%	77.0%	78.1%	79.0%
Kilometers of Plant	108,200	114,100	124,000	133,900
REVENUES				
Operating Income	593.0	673.3	767.0	870.6
Average Monthly Rate	$9.30	$9.96	$10.69	$11.47
Net Profit After Tax	36.7	51.5	75.2	89.1
Return on Net Fixed Assets	5.7%	7.2%	9.2%	10.0%
ASSETS				
Gross Fixed Assets	$1,210.0	$1,341.9	$1,562.5	$1,732.0
Net Fixed Assets	$ 648.5	$ 720.2	$ 821.3	$ 887.5

NOTE: Expression in Canadian dollars. Subscriber numbers and financials in millions.

Selkirk Communications, also a Canadian company that uprooted from the U.S.

Maclean Hunter would like to expand further in the American market, but has been frustrated by high prices. "We looked at a number of acquisitions for a number of years, and never could justify that kind of price," Gage says.

A partnership between cable and telcos is "possible but difficult, and depends on how badly the telcos want to be in the (cable) business," he says, noting that the industries, in Canada as well as in the U.S., do not have a history of cooperation. Similar to the American experience, Canadian cable operators haven't forgotten fights with the telcos over access to poles, Gage points out.

Financially assisting the Canadians in adopting new technology rapidly and diversifying is the fact that properties there turn over at a much slower pace, with mature system sale prices running at $800-$1,000 per subscriber, compared to the $2,500-$3,000 per sub fetched south of the border. Accordingly, Canadian system buyers enjoy return on investment in as soon as a year after purchase.

Another notable distinction between the two industries is that Canadian cable systems do not provide converter boxes to subscribers. Those units are sold in general merchandise and electronics retail stores. Observers note that the lack of control over the boxes probably contributes to a theft-of-service problem on both sides of the border.

For all of the differences, both industries share many common goals—strengthening customer satisfaction and loyalty, improving customer service, controlling churn, marketing different programming packages, competing with broadcasters for viewership, beating theft of service, planning for technological advances, and even keeping the telephone companies at bay.

"It's basically the same business, with the exception of the regulatory environment," comments Gage. "There's less regulation in the States."

The landmark free-trade agreement, ratified last year by both countries, will have some effect on cable in that one of its goals is establishing a mutual copyright payment scheme. Modeled somewhat after the American compulsory license and Copyright Royalty Tribunal, the agreement requires Canadian operators who pick up the signals of U.S. broadcast stations to compensate the owners of that programming.

Because approximately 70 percent of Canadians live within 100 miles of the U.S. border, they historically have relied on American broadcasters for much of their television. The lack of a Canadian copyright payment system has been a sore point with the creators of American programming, an issue that should be resolved when the new Canadian copyright system goes into effect on Jan. 1.

Anxiously awaiting the new copyright scheme are American superstations TBS, WGN, WPIX and WWOR, which are awaiting U.S. State Department approval to be distributed in Canada. The superstations will join CNN (received by 1.3 million subscribers) and Headline News (600,000 subs); Arts & Entertainment (1.2 million subscribers); Financial News Network (400,000 subs); The Nashville Network (just under 1 million subs); and Country Music Television (350,000 subs) in reaching a wide Canadian audience.

Teddy Turner IV, CMT's vice president of sales and marketing, reports that country music is so popular in Canada that CMT probably will be in a million Canadian homes by the end of the year, based on conversations he had with operators at the recent Canadian cable convention in Toronto.

CNN/Headline, A&E, TNN, FNN and CMT have been allowed to operate by the Ottawa government for about the past five years because they feature types of pro-

gramming unavailable in Canada.

Because many Canadians are leery of their country becoming the "51st state" and seek to preserve their cultural identity, the government has strict content regulations that will prevent some program services—notably MTV, ESPN and HBO—from ever competing with their Canadian counterparts MuchMusic, The Sports Network and First Choice.

The Canadian Broadcasting Corp.'s CBC Newsworld, Canada's first 24-hour national news and information network, launches July 31 to 4.5 million subscribers. Because CNN and Headline News generally cover little Canadian news, they are expected to have no problem remaining in Canada. Furthermore, CBC Newsworld will fill a domestic void by focusing on the large country from every region, with less emphasis on the U.S. and rest of the world.

In something of a programming role reversal, CBC is planning a cable channel for the U.S. called North Star, which will assemble the best of Canada's television. CBC is searching for a Canadian business partner to provide the financing, and also is finalizing an agreement with an undisclosed American partner for marketing and uplink services.

Jack Crane, CBC special projects officer, says the American firm would not necessarily be an established cable programmer or operator. Cognizant that tight channel capacity always is an issue when launching a cable network in the U.S., Crane says that North Star is at least a year away and contingent upon securing the necessary financing.

A Canadian version of C-SPAN called CPaC (Canadian Parliamentary Channel), developed by the CBC and cable operators, was scheduled to be the subject of a CRTC hearing on June 27. The channel, which will televise House of Commons sessions and provide coverage and analysis of the Canadian legislative and political process, has operator commitments representing 5.2 millions subscribers.

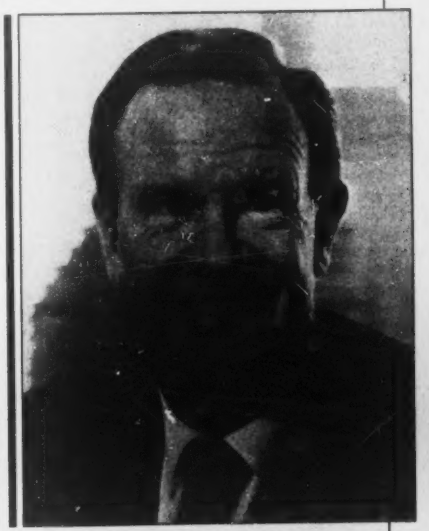
Pay-per-view seems to be a far off proposition, mainly because the country isn't technologically ready for it. Fred Klinkhammer, chairman of First Choice, the pay movie service for eastern Canada with 500,000 subscribers, notes that there are only 400,000 addressable homes in eastern Canada. Super Channel, the pay movie service for western Canada, has about 200,000 subscribers. For PPV to be successful, there must be a universe of at least 30 percent addressable homes throughout the country, Klinkhammer believes.

On the hardware side, most of the large American suppliers, including General Instrument, Anixter and Times Fiber Communications, already are doing business in Canada, so the free-trade agreement should not noticeably increase sales. But the cost of American hardware sold to Canadian operators likely will decrease with the eventual dissolution of duties, currently at 12 percent, over the next decade, in accordance with the trade pact.

Basic subscriber growth in Canada is expected to maintain a steady pace of just under three percent per year, reaching eight million subscribers by 1994. Penetration of homes passed will increase from 78.5 percent in 1987 to 80.4 percent in 1994, the Canadian Cable Television Association forecasts.

According to Statistics Canada data, from 1980 to 1987 annual revenue per basic subscriber increased from $81.19 to $138.14. The revenue is expected to increase to $148.38 in 1988 and reach $167.81 in 1989.

The rhetoric at this year's CCTA national convention in Toronto would have sounded familiar to any American cable executive, especially the concerns expressed about the telephone companies. Outgoing CCTA chairman Noel Bambrough, president of Cablecasting Ltd. of Toronto, said in a speech that "Our industry has had a 35-year running battle with Bell, in fact, all telcos in this country, and a negative view of the telephone industry. This view is not necessarily shared by the public. We must change the public perception if we want to keep the telcos out of our business."



Ted Rogers wants his MSO, Rogers Cablesystems, to offer Canadian long-distance telephone service.

He also called for better customer service combined with comprehensive, responsible self-regulation as essential ingredients for the industry's future success.

In Canada, telephone companies generally are prevented by law from

owning or operating cable systems. Current CRTC regulation allows only one cable company to serve a market, meaning there are no overbuilds, so if a telco wanted to get into cable it must find an unserved area or seek a change in law.

However, waivers are possible, such as the one obtained by Sasktel, which has an AM fiber system operating in Saskatchewan delivering 16 channels in a market test of video-on-demand services. The experiment allows subscribers to select from a menu of 192 movies. Once all 16 channels are activated, additional subscribers can tune in to any one of the 16 movies already selected.

Under a restriction similar to the AT&T consent decree, Bell Canada is prohibited from owning or operating cable companies. However, an affiliated company, Bell Canada Enterprises, isn't under the same prohibition and could theoretically obtain a license from the CRTC.

When Ted Rogers announced in April that he was entering the long-distance telephone market, Bell Canada renewed its rumblings about entering the cable business. Bell Canada and the provincial telephone companies, through their affiliation with Telecom Canada, have a monopoly in the long-distance business.

Mike Murphy, Bell Canada's director of policy development, points out that there's needless antagonism going on between the telcos and cable industry. Since the telcos are going to replace copper wire with fiber optics by the early to mid-1990s, telcos might make cable companies the proposition: "What about using our plants?" Under such a cooperative joint venture, telcos would not displace or compete with existing cable companies, Murphy points out.

Bill Anderson, British Columbia Telephone's business development manager, agrees that too much is made of the two industries' bad relations. Instead, BCT would like to see telcos and cable companies cooperate and become business partners. BCT has conducted research and development on providing video to the home, specifically video-on-demand. "The demonstration in the lab is working well. But we have no interest in pushing the lab demonstration into a product," Anderson says.

Fiber optics are going to be deployed in telco plants with or without cable. "That's a factual reality," Anderson says. "If the cable industry shows no interest in working with us, they will force the telephone companies into a different strategy," he adds.

The jury is out on just where the government stands on the telco entry issue. Within the past year, two communications government officials were replaced, CRTC Chairman Andre Bureau and Communications Minister Florence MacDonald. At the 1988 CCTA convention, Bureau and MacDonald had mostly good things to say about the cable industry and seemed inclined not to allow the telcos in cable.

However, at this year's convention their replacements—Acting CRTC Chairman Louis Sherman and Communications Minister Marcel Masse—were non-committal as to whether cable deserves any special protection from the telcos, noting that cable companies have non-programming, information service interests as well.

Masse's predecessor, MacDonald, had proposed that Parliament, in the still-pending Broadcasting Act, define cable systems as much more than common carriers to allow them to be program investors. It's unclear whether Masse shares that view.

Ending on a decidedly optimistic, upbeat note, a recent CCTA report on the industry's future concluded that HDTV will be introduced by the Canadian cable industry long before the telcos even have the ability to deliver video signals to the home.

At the CCTA convention, Ted Rogers made an apt point about the so-called "telco threat" that could have been directed at the American cable industry. He talked about how the cable industry must have a better public perception of services than the telcos. Rogers advised that repair lines should be open 24 hours; business offices should be open seven days a week from early morning to night; installations should be provided instantaneously through remote control as the telcos do, and in the interim, operators should provide installations at a time of the customer's choosing.

If that level of service can not be provided by all systems, then regional groupings and services offered by the larger companies at cost should be utilized, he said.

"In the final analysis, we will only prevail if we deliver the product better on our own facilities, and are seen by our subscribers to be doing the job better," said Rogers, who predicted that the U.S. Congress will amend the Cable Act within five years either by reimposing municipal rate control or by allowing telcos to compete with cable.

With enough of a challenge at home, it sounds like Rogers has no regrets about pulling out of the U.S. cable market. ■

Subscriber Count

Satellite national services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	382	9,000,000
Alternate View Network	300	4,500,000
Arts & Entertainment Network (A&E)	3,300	59,000,000
Black Entertainment Television	1,800	22,228,000
CNBC	N.A.	15,000,000
Cable News Network	11,860	50,295,000
Cable Value Network	1,850	21,000,000
C-SPAN	5,262	44,680,000
C-SPAN II	642	17,680,000
Country Music Television	1,092	9,124,974
The Discovery Channel	5,324	42,500,000
Eco/Galavision	300	1,000,000
ESPN	20,500*	51,100,000
Eternal Word Television Network	490	10,500,000
The Family Channel	8,505	44,277,000
Family Guide Network	700	4,500,000
FamilyNet	54	3,500,000
The Fashion Channel	650	10,400,000
Financial News Network	3,500	33,412,000
FNN Sport	1,940	19,500,000
Headline News	3,410	45,224,000
Home Shopping Network	3,470	16,565,770
Home Shopping Network II	372	6,618,549
The Inspirational Network	920	9,500,000
International Television Network	25	2,868,500
J.C. Penney TV Shopping Channel	119	5,100,000
KTVT	417	3,640,000
The Learning Channel	1,100	16,940,000
Lifetime	3,800	42,757,000
Mind Extension University	84	2,200,000
MTV	5,405	46,070,000
Movietime	447	13,000,000
The Nashville Network	2,741	44,835,000
National College Television	147	5,500,000
Nick At Nite	3,440	59,680,000
Nickelodeon	6,600	45,500,000
The Nostalgia Channel	350	5,500,000
Prevue Guide	7,944	10,000,000
QVC Network	1,937	14,000,000
RFD-TV	30	2,382,390
Silent Network	169	13,680,000
SportsChannel America**	N.A.	1,500,000
Superstation TBS	9,426	49,390,000
Telemundo***	1	100,000
TNT	7,745	29,100,000
The Travel Channel	400	11,000,000
Trinity Broadcasting Network	775	9,100,000
Univision***	640	500,500
USA Network	10,100	47,290,000
VH-1	2,530	32,139,000
Vision Interfaith Satellite Network	315	6,200,000
The Weather Channel	3,650	48,500,000
WGN-TV	11,415	24,000,000
WWOR-TV	2,600	12,500,000
WPIX-TV	858	9,678,474

Bonus/basic services

American Movie Classics	1,700	20,000,000
Bravo	375	2,500,000

Pay services

American Exxstasy	35	27,000
Cinemax	3,650	6,680,000
The Disney Channel	5,700	4,337,300
Home Box Office	7,400	17,000,000
The Movie Channel	3,250	2,700,000
The Playboy Channel	526	470,000
Showtime	6,000	6,680,000

Audio services

AEI Lifestyle	142	2,578,838
AEI StarTracks Vocal Hits	26	854,590
Cable Radio Network	49	1,556,736
Galactic Radio	84	1,050,000
KKGO Super Jazz	18	133,639
Moods Bible Institute	63	1,058,368
Satellite Radio Network	237	483,000
Tempo Sound	125	1,250,000
WFMT Chicago	170	1,259,904

Text services

AP News Cable	185	2,500,000
AP Business Plus	54	1,400,000
AP News Plus	75	2,100,000
Cable Sports Tracker	41	875,000
EPG	280	6,800,000
EPG Jr.	350	900,000
Genesis Storytime	39	1,550,000
Reuters NewsView	127	2,437,000

Computer services

DBC MarketWatch	462	9,200,000
X*Press Executive	487	14,000
X*Press X*Change	487	14,000

Non satellite-fed national services

Basic services	Affiliates	Subscribers
Cable Video Entertainment	190	18,000,000
Consumer Classified Ad Network	3	195,000
Fuji Network	3	12,000
Vector Consumer News	5	200,000
Vector Consumer Shopping Guide	9	325,000

Pay services

Nippon Golden Network	5	13,600

Interactive services

Basic services	Affiliates	Subscribers
Video Jukebox Network	12	543,000

Regional services

Basic services	Affiliates	Subscribers
Arizona Sports Programming Network	N.A.	210,000
Atlanta Interfaith	7	180,000
Bay Area Religious Channel	6	113,000
Cable TV Network of New Jersey	54	1,396,451
The Ecumenical Channel	9	170,000
KBL Entertainment Network	67	1,200,000
Life Newsvision	35	50,000
Madison Square Garden Network	112	2,400,000
Meadows Racing Network	14	600,000
News 12 Long Island	4	594,000
Niagara Frontier Sports Network	13	800,000
Northwest Cable Sports Network	3	700,000
Pennarama	28	750,000
Prime Cable	9	381,938
Prime Sports Network	11	300,000
Prime Ticket	115	3,500,000
SportsChannel Chicago	50	1,507,270
SportsChannel Ohio	2	280,000
Sunshine Network	200	2,310,000

Pay services

Home Sports Entertainment	250	1,000,000
Home Team Sports	125	1,200,000
New England Sports Network	171	317,201
Prism	87	427,000
Pro Am Sports	173	523,000
SportsChannel Florida	22	650,000
SportsChannel New England	154	1,028,431
SportsChannel New York	100	1,300,000
Z Channel	73	110,010

Note: Figures for affiliate/subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision, Cable Stats, 432 Park Avenue South, Suite 1010, New York, NY 10016.
N.A denotes information not available.
*Includes MMDS and SMATV systems
**Count represents standalone affiliates subscribers; portions of SC America are carried on Home Team Sports and the SportsChannel family of regional services.
***Spanish-speaking households.

Announced services

Satellite-fed services	Expected launch
American Western Network	4th Quarter 1989
The Asia Network	1989
Career Channel Network	1989
CD-I: The Digital Music Network	1989
The European Channel	1989
Digital Cable Radio	4th Quarter 1989
Digital Radio Channel	4th Quarter 1989
The Gaming Network	3rd Quarter 1989
HDTV Comedy Network (MTV)	1st Quarter 1990
HBO Comedy Channel	4th Quarter 1989
Interactive Game Network	3rd Quarter 1989
Kids Interactive Network	3rd Quarter 1989
The Landscape Channel	3rd Quarter 1989
Showtime Entertainment Network	1990
Motion Sports News Network	4th Quarter 1989
Music Image Channel	1989
Spanish TV News Network	4th Quarter 1989
Talk Television	4th Quarter 1989
Ultracom	1990

Non satellite-fed services	Expected launch
ACTV	3rd Quarter 1989
Mac-Scope	3rd Quarter 1989
The Howard TV TV Network	4th Quarter 1989